

Utah Commission on Service and Volunteerism IPT AmeriCorps Tracking System Basic Program Director User Guide



UServeUtah AmeriCorps Member Tracking System

Please Login to Ipt:

Note: The following information is UPPER / lower case sensitive.

Organization ID

User Name

Password

[Forgot your username or password?](#)

Using this Guide

This user guide is meant to inform program directors on the use of the AmeriCorps Member Tracking System. The features are listed in visual order and not in order of daily operations. To view the IPT System Flow, please go to page 16.

Using the System

Welcome to the Utah Commission on Service and Volunteerism AmeriCorps Member Tracking System. If you are new to a Utah AmeriCorps program, congratulations, you are now part of a movement of over 775,000 Americans that have served as AmeriCorps members. You will use this tracking system frequently to review hours and track your members AmeriCorps term progress.

Logging In

Prior to logging in the first time, you will receive an email with some or all of the following information:

To access the AmeriCorps tracking system:

www.runipt.com

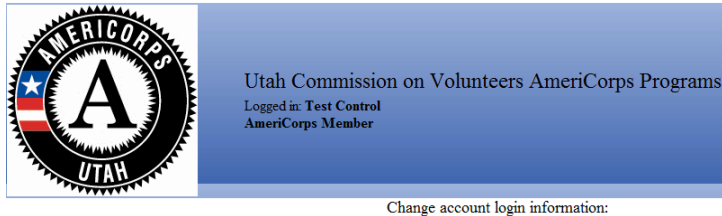
ORG ID: ucovac

First Time Username: ABC0101D

First Time password: ipt

Welcome to the Utah Commission on Service and Volunteerism AmeriCorps Member Tracking System. Please use the login information listed above to access the required forms for this program. Please bookmark the site runipt.com and our organization id: ucovac. Once you have used this org id on a computer, it should remain in your browser so you won't have to enter it again. **Federal Regulations require a unique username and password for every AmeriCorps member and supervisor. Sharing username and password information is in violation of federal regulations and may be reason for removal from the program.**

After logging in for the first time, using the default Login Name and Password



you will be asked to create a new Login Name and Password. These are case sensitive and should be kept confidential.

New Login Name

New Password

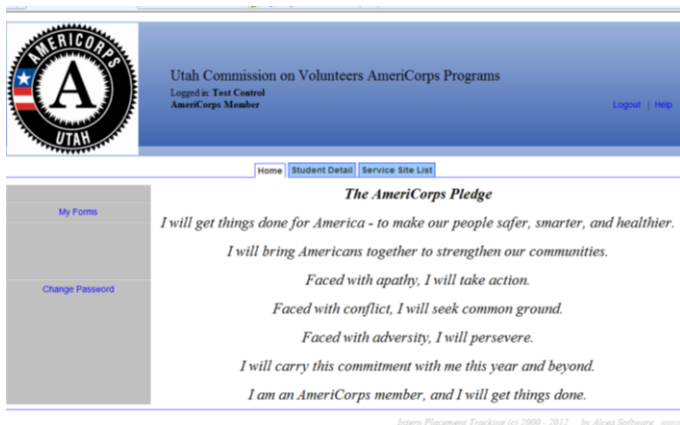
Confirm New Password

Be sure to create a Login Name and Password that you can remember.

Once you have logged in, you will see your home screen. The home screen contains all of the links and tabs you will need within the tracking system throughout your time with AmeriCorps.

The AmeriCorps Pledge

As AmeriCorps members, your members agree to the AmeriCorps pledge. Please help your members to recognize and appreciate the commitment they have made to serve not just this year, but in the years ahead.



Home Screen Features



On the left side of the screen you will see seven options in the blue navigation bar: My Forms, View Form Batches, Create New Form Batch, Send Group Emails, Change Email & Phone, Edit Member Service Agreement and Change Password.

My Forms: This link takes you to a list of all of the forms that have been assigned to you to complete.

View Form Batches: This link allows you to see all of the forms that you have ever assigned to members.

Create New Form Batch: This link allows you to schedule new forms for members.

Send Group Emails: This link allows you to email a group of members, site supervisors or sites directly from the system.

Change Email & Phone: This link allows you to change the contact information that we have in the system for you.

Edit Member Service Agreement: This link will allow you to make edits to the portions of the Member Service Agreement that are program specific.

Change Password: This link will allow you to create a new password. If you believe your password has been compromised you should change it immediately.

In the heading you will notice that your name and your Login type are listed on the left. On the right are the Logout button, a Help button and a Forum button. Each page has a help button that may provide information to assist you. The forum button will take you to an online forum for administrative users of the IPT program. Because IPT is primarily used by Social Work Programs at colleges and universities to place interns, most of the information in the forum will not be relevant to our AmeriCorps tracking. Please refer questions to the Utah Commission on Service and Volunteerism AmeriCorps Program Manager or the established Utah Program Directors forum outside of this system.



Across the top of the home screen, below the heading there are six tabs.

Home: This tab will bring you back to the home screen.

Service Site List: This tab will show you a list of all of the service sites within your program and allow you to access site detail.

Site Supervisor List: This tab will show you a list of all of the site supervisors within your program and allow you to access site supervisor detail.

Student List: This tab will show you a list of all of the members within your program and allow you to access the member detail.

Group List: This tab will show you a list of all of the groups within your program. Groups are how we identify which members belong to a certain time frame in their AmeriCorps service. Group Names in IPT must include the grant year first (please use the last two numbers for each year) and their program abbreviation. Examples: (12-13 MVP, 13-14 RGS Mentors, 13-14 DSU Dental Hygiene)

Reports: This tab will allow you to run reports on your program.

Service Site List

The service site list will show you all of the sites that your program places members at. There is an option to view sites alphabetically. You can either view

all sites from A-Z or view by a few letters at a time. Across the top of this tab you will see the following options: Add new Service Site, Hide Inactive, Sort and Search. There is a refresh button directly below those options. After you add a new site, you may need to use the refresh button to see the site in the list.

By clicking on one of the service sites, you will be allowed to view details about the service site.

In order to add a new site to the system, you will need to have a site name, complete address, phone number and you will need to know if it is a nonprofit, government agency or public school. All other fields for service sites are entered into the system at your discretion. Remember to hit save every time you add information to the system.

Site Supervisor List

The site supervisor list will show you all of the site supervisors that your program assigns members to. There is an option to view site supervisors alphabetically by last name. You can either view all supervisors from A-Z or view by a few letters at a time. Across the top of this tab you will see the following options: Add new Site Supervisor, Hide Inactive, and Sort by Service Site.

Home | Service Site List | Site Supervisor List | Student List | Group List | Reports

Add New Site Supervisor | Hide Inactive | Sort By Service Site

Site Supervisor List

A-Z AAB CDE FGH IJK LMN OPQ RST UVW XYZ

(A-Z)

Kovalevsk, Brenda Community Involvement Center
Stevens, Kately Willow Creek Middle School
Training, #2 Supervisor Training Site
Training, Supervisor Training Site
Winward, Dorcas Utah State University

Intern Placement Tracking (c) 2000 - 2012 by Aloha Software

In order to add a new site supervisor to the system, you will need to enter a first and last name, site, phone number, and email address. All other fields are entered into the system at your discretion. Remember to hit save every time you add information to the system. The site supervisor detail also allows you to view which members have been assigned to the site supervisor.

By clicking on one of the site supervisor's names, you will be allowed to view details about the site supervisor. You will need to assign a site supervisor to the Service Site where they will be monitoring member service. To assign a site supervisor to their service site, click on the "Change" link at the center of the profile. This will pull up a list of all of the service sites within your program. Select the appropriate site and then click save on their profile. As a note, the site should exist in the system before the site supervisor.

Home | Service Site List | Site Supervisor List | Student List | Group List | Reports

Site Supervisor List > Site Supervisor Detail

PREV | NEXT | Select Picture | Upload Picture | Forms

Site Supervisor Detail: Supervisor Training

Save

Last Name Training Phone 801-555-0011
First Name Supervisor Fax
Street Address 111 Way Title
City, State Zip SLC UT 84777
Email ucovactrainingsupervisor@gmail.com
☒ Active
☐ Nonprofit
☐ Government Agency/School
Service Site Training Site
Change
Attach AmeriCorps Site Supervisor Agree
Comments:
Internship Assignments

Semester	Student Name	Phone Number	Student Group
view	Quarter 1 Person, Amanda	801-555-0000	Test Group
view	Quarter 1 System, Sally		Test Group
view	Quarter 1 Training, Member		Test Group

Student List

Because this program was designed as intern placement software, many of the terms used relate specifically to schools. Please note that anytime the system uses the word Student, it is referring to the Member. The student list will show

you all of the AmeriCorps members currently enrolled in your program. Across the top of this tab you will see the option to add a new student (member). There is an option to view members alphabetically by last name. You can either view all members from A-Z or view by an individual letter.

By clicking on one of the member's names, you will be allowed to view details about the member in the Student detail page.

Student Detail

To create a new member profile in the system, select add new student from the student list page. You are required to enter: First name, last name, email address and group to start a member in the system. The other fields may be left blank in the beginning and your program can determine which fields to require a member to complete. The fields below the Emergency contact information may only be entered by program administrative staff.

The Utah Commission on Service and Volunteerism requires that the following attachments and checkboxes be completed, and that the file format is followed correctly:

Attachments

~~Enrollment and Eligibility Form~~
NSOPR Check (pdf)
Criminal History Check (pdf)
~~Member Service Agreement~~
~~Position Description~~
Mid Term Evaluation (pdf)
Exit Evaluation (pdf)

Checkboxes

Enrollment and Eligibility Form
NSOPR Check
Criminal History Check
Member Service Agreement
Position Description
EGrants Enrollment
Child Care Form (only if member is eligible)
Health Insurance Form (only if member is eligible)
Mid Term Evaluation
Exit Form
Exit Evaluation

Once you have entered all of the initial information, you will click save either at the top or the bottom center of the page. This will create the member profile in the system. When you are ready to give a member access to the system, scroll to the bottom of the member detail page. There is a small checkbox next to the Default Username and Password. By clicking on this box, it will generate the username and password for the member and send an automated email to the member inviting them to utilize the system.

The screenshot shows a web form interface. At the top, there is a search bar and a 'Contact Log' button. Below this is a section with a 'Reset Username and Password to Defaults (Already Reset)' checkbox, which is circled in red. To the right of this checkbox are labels for 'Default Username:' and 'Default Password:'. Below the checkbox is a 'Delete Student Record' button. At the bottom right, there is a 'Save' button. The page also includes a 'View in printable form' link at the bottom left.

Other options within the member detail:

Across the top of the member detail there are several links to pages associated with this members file. Each has a specific purpose and function within the system.

PREV: This will take you to the previous member in the alphabetized list of members.

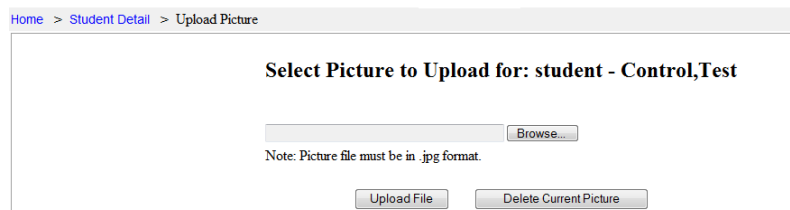
NEXT: This will take you to the next member in the alphabetized list of members.

Custom Fields: This will take you to a separate page where more documents can be uploaded to a member file. The program director for each program may determine how these fields are utilized unless otherwise directed by the state program manager.

Forms: This allows you to view all of the forms for a specific member. More information on this page is described in the section of this user guide titled Forms.

Select Picture: This feature should not be used.

Upload Picture: The option to upload a picture of the members is available. The program will determine if this is a requirement. The picture should be a portrait type image of the member, preferably in AmeriCorps service gear. To upload a picture, click on the link. You will see a dialogue box which reads:



Home > Student Detail > Upload Picture

Select Picture to Upload for: student - Control,Test

Browse...

Note: Picture file must be in .jpg format.

Upload File Delete Current Picture

Select picture to upload for: YOUR NAME

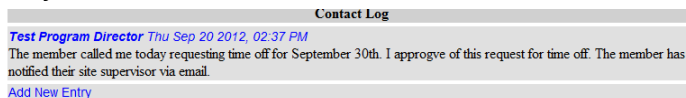
Using the browse button, you will be able to locate an image on your computer to upload to your detail. Once you have selected the image, select upload file. To change the image, click on the link again and select Delete Current Picture.

Dashboard: This is a quick place to view an individual member's progress towards completion of their hours within the system. More information on this page is described in the section of this user guide titled Dashboard.

Progress: This is a quick place to view an individual member's progress towards collecting demographic data and great stories. More information on this page is described in the section of this user guide titled Progress.

Field Assignments: A field assignment is the location and supervisor assigned to a member. For Placement 1 select change and then select the site supervisor that the member is assigned to. This will link the accounts so that when a form is assigned to a member, the site supervisor becomes the person required to approve the form. **Placement 1 is the initial site and supervisor for a member.** You will only enter information for Placement 2, 3, or 4 if a member needs to be reassigned. *Do not delete or change site supervisors for members that need to be reassigned. Just add a new placement. Their record will then show that there was a change.* *Please note that if you assign a member to a second placement, you will need to batch their forms through a second, third or fourth placement when the form asks you for the group "semester".

Contact Log: At the bottom of the member detail, you can track any contacts that you make with the member. Select "Add New Entry" to enter new detail. A



narrative field opens up where you can add new any information that needs

to be documented about your interactions with a member, site supervisor or site. Only the commission, the program director and the member can view these entries. These entries are time and date stamped, so it is the best way to track contact with members.

Forms

This link will take you to the same place that the My Forms button and Uncompleted Forms link on the home screen will take you. There will be a list of all of the forms that have been assigned to this member. Each Row is a separate form.

Home > Form List

Online Forms List For: Member Training

☐ Hide Completed Forms

	[Template]	Batch Name	Form ID	Status	Signed	Waiting For	Schedule Date	Due Date
View	Service Hour Record	Test	✉ Training_Member	new **		Student	2012-08-06	
View	Service Hour Record	TEST FORM	✉ Training_Member	new **		Student	2012-08-20	
View	Member Service Agreement	test	✉ Training_Member	new		AmeriCorps Program Director	2012-08-06	
View	Member Service Agreement	Trial Contract	✉ Training_Member	new		AmeriCorps Program Director	2012-08-09	
View	Member Service Agreement	trial form	✉ Training_Member	new		AmeriCorps Program Director	2012-08-21	
View	Service Hour Record	July 2012	✉ Training_Member	complete	12-		2012-07-26	2012-08-05

Each column designates information related to the

form. **Template** identifies which form type was assigned. **Batch Name** indicates information that the program director wants you to know about the form. **Form ID** indicates who the form belongs to. **Status** describes whether the form is new, active or complete. **Signed** designates who has signed the form. A "1" means that the first person required to sign the form has signed it, this is usually the member. A "2" means that the second person required to sign the form has signed it; this is usually the site supervisor. Some programs may require more than two signatures, if this is the case for your program there will be space for additional signatures.

The **Waiting For** column indicates who needs to complete the form next. The **Schedule Date** is the date that the form was sent out and the **Due Date** indicates the date the form is due. Selecting **View** next to any of the forms, you can view and/or complete the forms that are required by your program. If you are required to enter data or a signature, there will be open fields for you to complete.

Once a form is completed, if you no longer wish to see it in your list, you can select the box "Hide Completed Forms" at the top of your forms list. This will not erase your forms, it will simply make it easier to see only the forms that still require signatures. You may also sort your forms list by any of the columns whose headings are in blue.

Dashboard

The dashboard is a feature of IPT which allows a member to track their progress in the system for completing their AmeriCorps term.

Home Student Detail Service Site List									
Home > Form List > Student Detail > Dashboard									
Dashboard									
Sep 04, 2012									
Last Name	First Name	Member Development Total	Direct Service Total	Total Hours	Total Required	Total Remaining	Terms of Service	End Date	MSY
Training	Member	8	194	202	675	473	675 hours		

Hours recorded in the dashboard reflect all hours entered into the system and may include hours that have not yet been approved. Please verify that service hour records have all been signed and approved in order to get the most accurate reflection of their service on this dashboard.

Completion of an AmeriCorps term requires that time and attendance record keeping be conducted by the individual who supervises the AmeriCorps member. This time and attendance record is used to document member eligibility for in-service and post-service benefits. Time and attendance records must be signed and dated both by the member and by an approved individual with oversight

responsibilities for the member. Both signatures should be on the form no later than one week from the last hour recorded.

A program director has access to view all dashboards under their purvey all at once. By selecting Reports and then Dashboard, a program director can select which program they wish to view and then select run report. A dashboard containing all of the member data entered to date is viewable in this format.

[Back](#)

Dashboard
Sep 17, 2012

Last Name	First Name	Member Development Total	Direct Service Total	Total Hours	Total Required	Total Remaining	Terms of Service	End Date	MSY
Person	Amanda	0	0	0	300	300	300 hours		
System	Sally				300	300	300 hours		
Training	Member	11	342	353	675	322	675 hours		

Remember that hours recorded in the dashboard reflect all hours entered into the system and may include hours that have not yet been approved. Please verify that service hour records have all been signed and approved in order to get the most accurate reflection of a member's service on this dashboard.

Progress

The Progress link is a feature of IPT which allows a member to visualize and track their progress in the system for collecting demographic data during their AmeriCorps term.

[Student List](#) > [Student Detail](#) > [Progress](#)

Progress and Demographics Dashboard

First Name	Last Name	Volunteers Mobilized	Disadvantaged Children	College Students	Baby Boomers	Hours Served	Disadvantaged Children Served	Children of Incarcerated Parents Served	Individuals Mentored	Independent Living services	Certified	Available for Deployment	Local Disasters Responded To	Community Members Served in Disasters
Travis	Allred	11		8	1	52	30		1		yes	yes		

First Name	Last Name	Great Stories	Narrative
Travis	Allred	This has been a remarkable program to be apart of. I was able to take an underprivileged student under my wing and assist in numerous	The service I am and will be involved in is healthcare. This is something that has a tremendous impact on those served and those serving. I am just beginning this journey and already I am looking at situations from a service

Completion of an AmeriCorps Progress Report by AmeriCorps program directors is a requirement of the program, and the majority of the data required can be collected utilizing the Progress and Demographic Reporting Form that may be completed by members. This form may be batched out to members on a monthly or weekly interval.

A program director has access to view all Progress under their purvey all at once. By selecting Reports and then Progress, a program director can select which program they wish to view and the dates that they wish to include, and then

select run report. A report containing the entire member data entered during that date range is viewable in this format, including aggregated demographic data for all of your selected groups.

Progress and Demographics Dashboard														
Jul 17, 2013														
Groups:														
Dates: 2013-04-01 to 2013-04-01														
First Name	Last Name	Volunteers Mobilized	Disadvantaged Children	College Students	Baby Boomers	Hours Served	Disadvantaged Children Served	Children of Incarcerated Parents Served	Individuals Mentored	Independent Living services	Certified	Available for Deployment	Local Disasters Responded To	Community Members Served in Disasters
		1		1		3	110				yes	yes		
		6			3	5	23	2	6	25	yes	yes		
							60		12		yes	yes		
							145		120		yes	yes		
		2		2		1	170		20		yes	yes		
		1	75			4	260	90	13	130	yes	yes		
							90		40		no	no		
											yes	yes		
											no	no		
		2		2		9	105	25			yes	yes		
							90		40		yes	yes		
							50		50		yes	yes		
		1		1		2.25	29	8	50		yes	yes		
											no	no		
	TOTALS	13	75	6	3	24.25	1082	125	351	155	12	12		
First Name	Last Name	Volunteers Mobilized	Disadvantaged Children	College Students	Baby Boomers	Hours Served	Disadvantaged Children Served	Children of Incarcerated Parents Served	Individuals Mentored	Independent Living services	Certified	Available for Deployment	Local Disasters Responded To	Community Members Served in Disasters
First Name	Last Name	Great Stories						Narrative						
		This month I was able to help a student who was having a really rough time keeping their grades up in school so I helped them to have more confidence in themselves by helping them get higher grades. ----- I was able to help a sixth grade student out with their math homework for a week straight and they were able to catch up. Their grade went from an F to a B and they were very proud of what they had accomplished. The student was several weeks behind and did not know how to catch up with out guidance. ----- -----						This month I found satisfaction in working with English language learners on several occasions. I asked them how hard it is to learn in a new language and they told me about he added concerns of learning pronunciation, and new vocabulary. Talking to them gave me more meaning in my worker with Americorp. ----- I was able to find satisfaction in building relationships with students this month. After working with them for several months I was sad to leave them and I was happy that I had the opportunity to work with them. Several kids told me they hoped to see me next year and that they were happy to have had the chance to work with me. ----- -----						
		I've been pretty sad that my time as an official intern will be coming to an end soon. Sometimes when you leave awesome experiences like this you hope that you have made a difference for the people you are serving. The other day one of the girls that I have gotten to know through my experience came up to me to tell me how much she loves me and how much she will miss me. It felt so good to know that my service has come to better						At we serve people with all types of disabilities. Specifically this month I planned and ran a trip for people with visual impairments. My service allowed them the opportunity to get involved in activities that would otherwise be inaccessible to them. In the future I plan to continue my service with I will be assisting with activities or office work that needs to be done. Some challenges this month have been the weather. Our trip was very cold and it was a hard						

Completing Forms

Utah AmeriCorps Enrollment/ Eligibility Verification Form

This form is the very first form a member is required to complete in the IPT system as part of their AmeriCorps term. Every field is required. A member should complete this form as soon as they are given access to the AmeriCorps tracking system.

If the member is under 18 a parent or legal guardian is required to sign the form. After completing the form in the system, please use the printable version link at the bottom of the form and have a parent or guardian sign a paper version of the form. The program director then scans and saves to the online member detail next to the form upload option "Attach Enrollment and Eligibility Form".

Member Service Agreement

The member service agreement is the contract between a member and the AmeriCorps program. The program director will enter all of the fields required, utilizing the "Edit Member Service Agreement" link on the home screen, and in completing remaining fields that do not auto-populate from the member detail.

It is the member's responsibility to read and review the entire form and sign via an electronic signature, before beginning their term of service. You cannot begin counting hours until this agreement is signed. All terms must be in writing within the Member Service Agreement to be valid.

Member Service Hour Record

This is the timekeeping form used by all Utah AmeriCorps programs. The program director should determine the amount of detail required in the service hour record descriptions. Only 15 minute increments should be counted, so members should save their hours in the following format.

15 min = .25

45 min. = .75

30 min = .50

1 hour = 1

Members should round up or down to the nearest 15 minute mark. They should enter their time in the correct category as described on the form, either Member Development, Direct Service or Fund Raising.

Members are required to enter time for every day. They should enter a "0" in the direct service column for any day that they did not serve. They may enter their time at any point AFTER the service has been completed, before the due date. They should not enter time before they actually do that service. Early entry of time is considered to be fraud and can be grounds to terminate an AmeriCorps term. Remind members to save their work every day that they enter time.

In the daily description box, members are required to enter text about what they did that day in relation to their AmeriCorps service. Each member is required to utilize a description from a required list made by their particular program. These descriptions are based on the members position description. If they did not serve that day, because it was a weekend or they weren't scheduled, they should write "Did not serve today." or "N/A". It is required that they enter a description for every day, even if they did not serve.

At the end of their service for that time period, members will submit their Service Hour Record. By selecting the submit button, they will be directed to the following dialogue box:

Day	SAVE WORK	Member Development	Direct Services	Fund Raising	Total
25	Description of Days Activities				

Sign this document by entering your name in the box below. Once you have signed here you will no longer be able to change fields in document.

SUBMIT SIGNATURE CANCEL

26					
----	--	--	--	--	--

By entering their name, they declare and affirm under penalty of perjury that the statements made herein are true and correct to the best of their knowledge,

information and belief and that the time entered was completed by the member indicated on the dates indicated. They further declare that this time was spent performing allowable AmeriCorps activities.

Once they have submitted their Service Hour Record, an email will automatically go to their site supervisor requesting approval on the service hour record. If the site supervisor does not approve of the time, the member will receive an email that will indicate that their service hour record signature has been cleared. They will need to return to that form in IPT to review the reason that their site supervisor did not approve the service hour record. Make the corrections to the form and then re-sign the form.

Clear Student Signature
Supervisor - reason signature was cleared:
On July 11th you were not changing the world, you were still sick. Please correct the hours for that day.

Site supervisors are the only ones allowed to clear signatures on service hour records. Because the site supervisor is acting as the person with oversight responsibility for the member service hours, they need to be the one to clear the signature. They will have to re-sign the form, so it is best that they are the one to clear signatures that are incorrect so they can note the errors. The integrity of the form data needs to remain in tact, so only those directly involved in service hours should be making changes to the service hour record. Time and attendance records must be signed and dated both by the member and by an approved individual with oversight responsibilities for the member. Both signatures should be on the form no later than one week from the last hour recorded.

Monthly Progress and Demographic Reporting Form

This form is used to record all of the narrative and demographic data that is required from the Corporation for National and Community Service, the federal agency with oversight responsibility for AmeriCorps. This information is very valuable for maintaining funding for your program. Members should take this form very seriously and enter data that is accurate and paints a picture of the significant work they are doing to change their community.

The narrative portions of this form are program specific. Program directors should inform their members as to what data is required for your program. A member may be terminated from the program if they fail to report the required information to program directors in this form. Remind members that their numbers should be unduplicated.

Scheduling/Assigning Forms

There is a very specific flow to follow in order to enter member data and schedule forms in the most user friendly and efficient manner. This will be known as the IPT System Flow. Please review this process and utilize the work flow to efficiently send out forms to members. The best option would be to choose one day a month when you will schedule forms for your members. In this way, you do not schedule forms for members that are too far in the future. You do not want to be questioned about the integrity of your program data based on service hour records or other forms that were created and completed before the service was actually performed.

Form Batch Name Standards

For all form batch names programs should use the same naming standards. The batch name should begin with the program year in a YY-YY format, next they should list the month that the form represents (if the form is for an entire term of service, no month is required), next the form should list the dates that the form represents (if the form is for an entire term of service, no dates are required), and last the name should include a title (titles should remain consistent throughout the program year).

Examples:

14-15, July 1-7 Service Hour Record

14-15 Enrollment and Eligibility Form

14-15, August 1-31 SHR

IPT System Flow

Meet and interview candidates for the program. When you have determined who you want in your program begin the IPT System Flow.

Step 1: Create Service Sites

How: Login → Service Site List → Add new Service Site → enter Service Site Name and all other required detail to record → Assign to AmeriCorps Program → Save

Repeat for as many sites as you have ready to start. Don't go on to the next step if you have other sites to enter until you have repeated step 1 for all sites.

Step 2: Create Site Supervisor

How: Login → Site Supervisor List → Add new Site Supervisor → enter Last Name, First Name, Email address and all other required detail to record → Change Service Site → Select Site from the List that pops up → Save

Repeat for as many site supervisors as you have ready to start. Don't go on to the next step if you have other site supervisors to enter until you have repeated step 1 and 2 for all site supervisors.

Step 3: Create Group

How: Login → Group List → Add new Group → Name (see page 4 for group naming requirements) → Assign to Program → Short name (only 8 characters) → check box "Include students in site supervisor list" → check box "Allow Students to Login" → Save

Step 4: Enter new member in system

How: Login → Student List → Add New Student → enter Last Name, First Name and Email Address → Assign to group → Save → Assign to Field Placement (Service Site/ Site Supervisor) → Add additional data about member term as needed for Enrollment form → Select Reset Username and password box → Save → AUTOMATED EMAIL IS SENT TO MEMBER

Repeat for as many members as you have ready to start. Don't go on to the next step if you have other members until you have repeated steps 1 and 2 for all members.

Step 5: Schedule Enrollment Form

How: Login → Create New Form Batch → Enrollment Eligibility Verification → Next → Batch Name: (Follow Batch Name Standards see page 16) → Group → Semester → Next → Optional Due Date → Finish Scheduling → AUTOMATED EMAIL IS SENT TO MEMBER

B: If you add any new members to the same group after this point, you will need to add them to the recipient list for the form.

How: Login → View Form Batch → Find form in list → Select tools on far right → Edit → View /Edit Recipient List → Add students to this batch → member name → Finished editing recipient list → Save → AUTOMATED EMAIL IS SENT TO MEMBER

Step 6: Edit Member Service Agreement

How: Login → Edit Member Service Agreement → Select Program → Edit Fields (You may use most default text, but make edits where needed) → Save

Step 7: Schedule Member Service Agreement

How: Login → Create New Form Batch → Member Service Agreement → Next → Batch Name: (Follow Batch Name Standards see page 16) → Group → Semester → Next → Optional Due Date → Finish Scheduling → AUTOMATED EMAIL IS SENT TO MEMBER

B: If you add any new members to the same group after this point, you will need to add them to the recipient list for the form.

How: Login → View Form Batch → Find form in list → Select tools on far right → Edit → View /Edit Recipient List → Add students to this batch → member name → Finished editing recipient list → Save → AUTOMATED EMAIL IS SENT TO MEMBER

Step 8: Schedule Service Hour Record

How: Login → Create New Form Batch → Service Hour Record (Choose Monthly or Weekly) → Next → Batch Name: (Follow Batch Name Standards see page 16) → Group → Semester → Next → Assign a Due Date → Finish Scheduling → AUTOMATED EMAIL IS SENT TO MEMBER

B: If you add any new members to the same group after this point, you will need to add them to the recipient list for the form.

How: Login → View Form Batch → Find form in list → Select tools on far right → Edit → View /Edit Recipient List → Add students to this batch → member name → Finished editing recipient list → Save → AUTOMATED EMAIL IS SENT TO MEMBER

Repeat Scheduling Service Hour Records for each month or week that a member will serve. You may choose to schedule these all at once or once a week/month. We recommend that you do not schedule them more than a month in advance.

Step 9: Schedule Monthly Progress and Demographic Reporting

How: Login → Create New Form Batch → Monthly Progress and Demographic Reporting → Next → Batch Name: (Follow Batch Name Standards see page 16) → Group → Semester → Next → Assign a Due Date → Finish Scheduling → AUTOMATED EMAIL IS SENT TO MEMBER

B: If you add any new members to the same group after this point, you will need to add them to the recipient list for the form.

How: Login → View Form Batch → Find form in list → Select tools on far right → Edit → View /Edit Recipient List → Add students to this batch → member name → Finished editing recipient list → Save → AUTOMATED EMAIL IS SENT TO MEMBER

Repeat Scheduling Monthly Progress and Demographic Reporting for each month that a member will serve. You may choose to schedule these all at once or once a month. We recommend that you do not schedule them more than a month in advance.

After member completes their service term.

If your members do not all finish their terms around the same time period, please use step 10, otherwise you can skip to step 12

Step 10: Create Group (Program Name Exit Processing)

How: Login → Group List → Add new Group → Name (see page 4 for group naming requirements) → Assign to Program → Short name (only 8 characters) → check box "Include students in site supervisor list" → check box "Allow Students to Login" → Save

Step 11: Move Members to Exit Processing Group

How: Login → Student List → View a Specific Member Name → Move to group → Save

Step 12: Schedule Exit Form

How: Login → Create New Form Batch → Exit Form → Next → Batch Name: (Follow Batch Name Standards see page 16) → Group → Semester → Next → Assign a Due Date → Finish Scheduling → AUTOMATED EMAIL IS SENT TO MEMBERS

B: If you add any new members to the same group after this point, you will need to add them to the recipient list for the form.

How: Login → View Form Batch → Find form in list → Select tools on far right → Edit → View /Edit Recipient List → Add students to this batch → member name → Finished editing recipient list → Save → AUTOMATED EMAIL IS SENT TO MEMBER

Step 13: Create Group

How: Login → Group List → Add new Group → Name (see page 4 for group naming requirements) → Assign to Program → Short name (only 8 characters) → Save

Step 14: Reassign member so they will no longer have access to the system

How: Login → Student List → Find Member Name → Select Move button → Reassign to exit group → Save

Running Reports

IPT has many features that allow you to run reports on your members' progress. This guide will assist you in learning about how to run a variety of reports. New report suggestions come in frequently and as we have the ability to do so, we will continue to add new reports to the database.

Types of reports you may want to run:

Dashboard of Hours

Progress and Demographic Reporting

Form Status

Member Record Data

Dashboard of Hours

➤ **To review for a single member**

Login → Student List → Select member → Select Forms → Dashboard → Review Member Totals ****Note****Verify that all forms that have been started are completed (forms that are active, but have not been approved will still be included in the dashboard total)

➤ **To review for all active members in your group**

Login → Reports → Dashboard → Review Member Totals ****Note****Verify that all forms that have been started are completed (forms that are active, but have not been approved will still be included in the dashboard total)

Progress and Demographic Reporting

➤ **To review for a single member**

Login → Student List → Select member → Select Forms → Progress → Review Member Totals

➤ **To review for all active members in your group**

Login → Reports → Progress → Select your group and the date range for the reporting period → Review Member Totals **Note**If you are needing data from January 1- March 31, but you scheduled the form batch in December, you will need to use the date that the form was scheduled, not January 1. This is why it is important to not schedule this form in advance.

Form Status

Login → View Form Batches → Find the form you need a report on → select the tools on the right hand side of the row → Select List → Sort by Status → Review the list of names and who has yet to complete the form

Member Record Data

Login → Reports → Student Custom Export → Select from Available fields on the right. Fields will be moved to the box on the left → Run → Select Group to include in report → Export Data → Open or Save Report

Questions about the system

If members or site supervisors have questions about how to use the AmeriCorps Tracking System, they should contact you as the AmeriCorps program director. You have been trained on its use and should be able to answer most, if not all member and site supervisor questions. If you are unable to assist, a program director or other program staff may contact the Commission on Service and Volunteerism to try to find the answer. Members and site supervisors should not contact the Commission for any questions related to their term or the use of this system. All members and site supervisors will be directed back to their program director.

Reporting Errors

As you utilize the system, if there are technical errors, you may report these errors by visiting <http://tinyurl.com/ucovacErrorReport> . To request that a member or a member's forms be deleted or have signatures cleared, please visit <http://tinyurl.com/IPTdeleteRequest>. Completing this form will allow the Utah Commission on Service and Volunteerism to track errors and address them in a timely manner. All fields are required on this form.

Emails sent with requests or reports related to either of these forms will be returned to the sender. We need an efficient way to track changes in the system and this is the best way to do that.